




PART OF THE HAUSTE GROUP OF COMPANIES  HAUSTE
Group

Crossflow Payments User Guide

Ideal Shopping Direct

January 2014

Welcome to Crossflow Payments! Thank you for taking the time to sign up to Crossflow Payments. This guide will hopefully give you all the information you need to get going. If you do have any questions though, please visit <http://isdportal.crossflowpayments.co.uk/> or contact us.

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1. Your Crossflow Payments Account

1.1 Accessing your account via the web

1. To access your Crossflow Payments account, first visit <http://isdportal.crossflowpayments.co.uk> and click the 'Log In' button.

LOG IN

CROSSFLOW
PAYMENTS

[Login](#) | [Register](#) | [Contact Us](#)

Login Form

* - These fields are required

User Details

Email: (*)

Password: (*)

[Forgot password?](#)

Login

2. Enter the e-mail you registered your account with and your password and click 'Login'.

If you have forgotten your password, please choose "Forgot password?"

If you have forgotten your password you will be brought to "Password Recovery/ Reset Form". Please enter your email address here and click send.

The Crossflow Payments system will then send the registered account an email. Please follow the link sent in the email to reset your password.

Password Recovery/Reset Form

Please provide your login email, click the 'Send' button once, and we will send you a Password Recovery/Reset link.

The email is not instant and may take up to 10 minutes.
Please ensure your Spam filters do not block the email.

If you have any problems please contact the Crossflow Payments Support Team on:
0845 862 3031 or support@crossflowpayments.co.uk

* - This field is required

Your Email Address*Email: (*)***Send**

1.2 The main 'Folder View'

The Crossflow Payments system all works around the central 'Home View'. This is where you can see all your documents (both sent and received), control your user settings and contact the support team.

The Crossflow Payments 'Home View':

The screenshot shows the 'Home View' of the Crossflow Payments system. At the top, there are logos for 'ideal WORLD' and 'Create AND CRAFT'. A welcome message reads: 'Welcome [noaccount@idealsshoppingdirect.co.uk] Support level:'. Below this is a navigation bar with 'HOME' and 'SETTINGS' tabs. The 'HOME' tab is active, showing a 'MAIN MENU' with links to 'Inbox' (4218), 'Sent', 'Draft', 'Archived', and 'Deleted'. A 'CUSTOMISED FOLDERS' section lists 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', 'Testing', and 'June Testing'. A 'QUICK LINKS' section includes 'Change My Password' and 'Support'. The right side of the page features a 'SEARCH' bar, 'Document Notifications' (listing new unread documents from IDEAL SHOPPING DIRECT and Hauste Group), and a 'Document Totals' table.

Folder	Total Number of Documents
Inbox - Received Documents	4393 (4218 unread)
Sent Documents	42
Draft Documents	51
Archived Documents	4
Deleted Documents	3

1. Home

The "Home" button brings you to the main screen (as shown above)

2. Settings

[My Account:](#) Enables you to view and update account details and change your password.

[Company Information:](#) Allows you to view or edit your company information. Please note- if you would like to change your company e-mail please contact Crossflow Payments Support (support@crossflowpayments.com).

[Manage Users:](#) Here you can add or delete users and change user permissions on folders and document types.

[Manage Folders:](#) Used for creating folders and subfolders.

3. Main Menu

Inbox: Documents you receive are stored here.

Sent: Documents you sent are stored here.

Draft: A document you have edited and not yet sent would be saved in Drafts.

Archived: Documents you have archived off are stored here. You archive a document by selecting the green button on the right of the document and choosing "Archive Document". You can also bulk archive the document by choosing the bulk archive symbol at the top of the page and checking the check boxes of the documents you want to archive.

The screenshot shows the web application interface. At the top, there are logos for 'ideal WORLD' and 'Create AND CRAFT'. A welcome message for '[noaccount@idealshoppingdirect.co.uk]' is displayed, along with a 'Support level' indicator and social media icons. Below the header is a navigation bar with 'HOME' and 'SETTINGS' tabs. A 'MAIN MENU' sidebar on the left lists 'Inbox', 'Sent', 'Draft', 'Archived', and 'Deleted'. The main content area is titled 'Inbox - Received Documents' and contains a table of documents. A context menu is open for document 'n49384945', showing actions: 'Open Document', 'Despatch Confirmation', 'Move to folder', 'Archive Document', and 'Delete Document'. Blue arrows point to the 'Inbox' menu item and the context menu.

Sender & Document Type	Document Reference	Date Received	Date Opened
IDEAL SHOPPING DIRECT PLC Ideal Picklist V2	150098na	02-07-2012 08:11:36	08:11:36
IDEAL SHOPPING DIRECT PLC Ideal Purchase Order	063847-v1na	25-05-2012 13:13:37	13:13:37
IDEAL SHOPPING DIRECT PLC Ideal Purchase Order	063593-v1na	21-05-2012 10:15:07	10:15:07
IDEAL SHOPPING DIRECT PLC	063085-v1na	12-05-2012 12:12:12	12:12:12

Deleted: Documents you have deleted are stored here. You delete a document by selecting the green button on the right of the document and choosing "Delete Document". You can also bulk delete the document by choosing the bulk delete symbol at the top of the page and checking the check boxes of the documents you want to delete. Once a document has been deleted it cannot be moved back to the Inbox or another folder.

This screenshot is identical to the one above, showing the web application interface with the 'Inbox - Received Documents' table and the context menu for document 'n49384945'. Blue arrows point to the 'Inbox' menu item and the context menu.

Sender & Document Type	Document Reference	Date Received	Date Opened
IDEAL SHOPPING DIRECT PLC Ideal Picklist V2	150098na	02-07-2012 08:11:36	08:11:36
IDEAL SHOPPING DIRECT PLC Ideal Purchase Order	063847-v1na	25-05-2012 13:13:37	13:13:37
IDEAL SHOPPING DIRECT PLC Ideal Purchase Order	063593-v1na	21-05-2012 10:15:07	10:15:07
IDEAL SHOPPING DIRECT PLC	063085-v1na	12-05-2012 12:12:12	12:12:12

4. Customised Folders

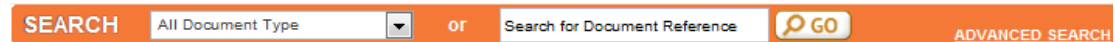
Stores the folders and sub folders that you have created.

5. Quick Links

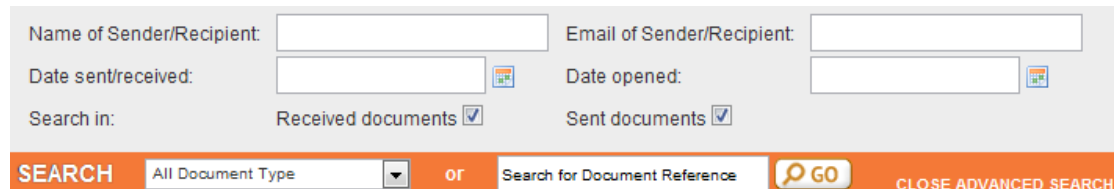
Change my Password: Shortcut to change your account password

[Support:](#) Shortcut to Support. This brings you to our ticketing system.

6. Search



To quickly find your document:
Select the document type and search for the document reference number.
You can enter all or part of the reference number.



Advanced Search:

This give you the ability to locate your document by entering the date it was sent/received/ opened, where to search and the name/ email of the sender/ recipient

7. Support

This brings you to our ticketing system. Here you can open a new ticket or check the status of your previous tickets.

8. Log Out

To securely logout of Crossflow Payments.

9. Document Notifications

You can easily view the number or unread documents you have in your inbox and also what type of document they are.

10. Document Tools

Here is a summary of the total documents attached to your account and the number of documents in each folder.

1.3 Creating a New folder

1. To create a new folder to organise your documents click on "SETTINGS" and choose "MANAGE FOLDERS".

Welcome [noaccount@idealsshoppingdirect.co.uk]
Support level: ★★★★★

HOME SETTINGS Support Logout

My Account Company Information **Manage Users** Manage Folders

MAIN MENU

- Inbox 4218
- Sent
- Draft
- Archived
- Deleted

CUSTOMISED FOLDERS

- Hauste
 - Blue
- New
 - Picklist
 - May (4)
- Testing
 - June Testing

Edit Customised Folders

QUICK LINKS

- Change My Password
- Support

Add a New User

Click on the Add button to add a new User to the System **+ Add**

Current Users

First Name	Surname	Email Address	Phone Number	Level	Receive Doc Email	Permissions	Delete
Hauste	Team	noaccount@idealsshoppingdirect.co.uk	08701417031	admin	no	Permissions	Delete

2. Add a main folder by creating a folder name in the text box provided and selecting enter or by clicking on the green plus icon.

Welcome [noaccount@idealsshoppingdirect.co.uk]
Support level: ★★★★★

HOME SETTINGS Support Logout

My Account Company Information Manage Users **Manage Folders**

Manage Folders First time here? → ?

Add Main Folder

Testing **+**

Modify Folders / Add Sub-Folder

Folder Name	Actions
Hauste	✎ ✖
Blue	✎ ✖
New Sub Folder Name	+
New	✎ ✖
Picklist	✎ ✖
May	✎ ✖
New Sub Folder Name	+

3. Add a sub folder by typing the folder name into the text box provided and selecting enter or by clicking on the green plus icon.



Welcome [noaccount@idealshoppingdirect.co.uk]
Support level: ★★★★★



HOME SETTINGS

Support Logout

MAIN MENU

- Inbox 4219
- Sent
- Draft
- Archived
- Deleted

CUSTOMISED FOLDERS

- Hauste
 - Blue
- New
 - Picklist
 - May (4)

[Edit Customised Folders](#)

QUICK LINKS

- [Change My Password](#)
- [Support](#)

My Account

Company Information

Manage Users

Manage Folders

Manage Folders

First time here? → ?

Add Main Folder



Modify Folders / Add Sub-Folder

Folder Name	Actions	
Hauste		
Blue		
<input type="text" value="New Sub Folder Name"/>		
New		
Picklist		
May		
<input type="text" value="New Sub Folder Name"/>		
Testing		
<input type="text" value="June"/>		



1.4 Permissions

1. Once you have created a folder you must now give each user permission to view this folder. To give users permissions you must choose "Manage Users" and select "Permissions".

The screenshot shows the user management interface for 'ideal WORLD' and 'Create AND CRAFT'. The top navigation bar includes 'HOME', 'SETTINGS', 'Support', and 'Logout'. The 'Manage Users' tab is active, showing an 'Add a New User' section with an '+ Add' button. Below this is a table of 'Current Users' with columns for First Name, Surname, Email Address, Phone Number, Level, Receive Doc Email, Permissions, and Delete. The table lists one user: 'Hauste Team' with email 'noaccount@idealshoppingdirect.co.uk' and phone '0870 1417031', at the 'admin' level. The 'Permissions' button for this user is highlighted. On the left sidebar, the 'MAIN MENU' includes 'Inbox' (4219), 'Sent', 'Draft', 'Archived', and 'Deleted'. The 'CUSTOMISED FOLDERS' section lists 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', and 'Testing'. The 'QUICK LINKS' section includes 'Change My Password' and 'Support'.

First Name	Surname	Email Address	Phone Number	Level	Receive Doc Email	Permissions	Delete
Hauste	Team	noaccount@idealshoppingdirect.co.uk	0870 1417031	admin	no	Permissions	Delete

2. Folders and DocTypes are displayed here. Selecting the check boxes gives the user permissions.

The 'Edit User Permissions' dialog box is shown. It has a title bar with a close button (X). The 'Folders:' section lists 'Hauste', 'Blue', 'New', 'Picklist', 'May', 'Testing', and 'June Testing'. Each folder has a checkbox to its right. The 'Hauste', 'Blue', 'New', 'Picklist', and 'May' folders have their checkboxes checked. The 'Testing' and 'June Testing' folders have their checkboxes unchecked. A note below the folders says 'Note: Click on folder names for smart selections.' Below the folders is a 'Save' button. The 'Doctypes:' section lists 'Ideal Picklist V2' and 'Ideal Purchase Order'. Each doctype has a checkbox to its right. Both 'Ideal Picklist V2' and 'Ideal Purchase Order' have their checkboxes checked. Below the doctypes is another 'Save' button.

Edit User Permissions

Folders:

- ☒ Hauste
- ☒ Blue
- ☒ New
- ☒ Picklist
- ☒ May
- ☐ Testing
- ☐ June Testing

Note: Click on folder names for smart selections.

Save

Doctypes:

- ☒ Ideal Picklist V2
- ☒ Ideal Purchase Order

Save

1.5 Add users

1. To add another user to the account you can choose "Settings" and then "Manage Users".
2. Then select the green "+Add" button to begin entering the new users details.

The screenshot shows the user interface of the Ideal World and Create and Craft system. The top navigation bar includes 'HOME', 'SETTINGS', 'Support', and 'Logout'. The 'SETTINGS' tab is active, and the 'Manage Users' sub-tab is selected. The 'Add a New User' section contains a green '+ Add' button, which is highlighted by a blue arrow. Below this is a table of 'Current Users' with columns for First Name, Surname, Email Address, Phone Number, Level, Receive Doc Email, Permissions, and Delete. The table shows one user: 'Hauste Team' with email 'noaccount@idealshoppingdirect.co.uk' and phone number '08701417031'. The 'Permissions' column has a 'Permissions' button, and the 'Delete' column has a 'Delete' button. On the left sidebar, the 'MAIN MENU' includes 'Inbox' (4219), 'Sent', 'Draft', 'Archived', and 'Deleted'. The 'CUSTOMISED FOLDERS' section lists 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', and 'Testing'. The 'QUICK LINKS' section includes 'Change My Password' and 'Support'.

3. Here you enter the new user's details.

The screenshot shows the 'Add New User Form' with a red 'X' icon in the top right corner. The form has a title 'Add New User Form' and a note '* - These fields are required'. The 'User Details' section contains the following fields:

- First Name: (*)**
- Surname: (*)**
- Phone Number: (*)**
- Email Address: (*)**
- User Level: (*)**
- Receive Doc Email: (*)**

A blue arrow points to the 'Submit' button at the bottom right of the form.

4. Once you have entered the new users details then click on "Submit".
5. You can now see that the new user has been added to the account.

The screenshot shows a web application interface for 'ideal WORLD' and 'Create AND CRAFT'. The top navigation bar includes 'HOME' and 'SETTINGS'. The left sidebar contains a 'MAIN MENU' with 'Inbox' (4219), 'Sent', 'Draft', 'Archived', and 'Deleted', followed by 'CUSTOMISED FOLDERS' including 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', 'Testing', and 'June'. The 'QUICK LINKS' section at the bottom left has 'Change My Password' and 'Support'. The main content area is titled 'Manage Users' and shows a 'Welcome [noaccount@idealshoppingdirect.co.uk]' message with a 'Support level' of four stars. Below this, there's a section 'Add a New User' with a '+ Add' button. A message states 'New user has been added successfully and an email has been sent.' Below this is a table of 'Current Users'.

First Name	Surname	Email Address	Phone Number	Level	Receive Doc Email	Permissions	Delete
Hauste	Team	noaccount@idealshoppingdirect.co.uk	08701417031	admin	no	Permissions	Delete
Ryan	Gosling	ryang@hauste.com	021112233	normal	yes	Permissions	Delete

A blue arrow points to the 'normal' level of the 'Ryan Gosling' user entry.

1.6 Deleting a user

1. If you want to delete the new user, please select "Delete".

Welcome [noaccount@idealshoppingdirect.co.uk]
Support level: ★★★★★

Support Logout

HOME SETTINGS

My Account Company Information **Manage Users** Manage Folders

MAIN MENU

- Inbox 4219
- Sent
- Draft
- Archived
- Deleted

CUSTOMISED FOLDERS

- Hauste
 - Blue
- New
 - Picklist
 - May (4)
- Testing
 - June

Edit Customised Folders

QUICK LINKS

- Change My Password
- Support

Add a New User

Click on the Add button to add a new User to the System **+ Add**

Current Users

New user has been added successfully and an email has been sent.

First Name	Surname	Email Address	Phone Number	Level	Receive Doc Email	Permissions	Delete
Hauste	Team	noaccount@idealshoppingdirect.co.uk	08701417031	admin	no	Permissions	Delete
Ryan	Gosling	ryang@hauste.com	021112233	normal	yes	Permissions	Delete

2. A confirmation will then pop up on the screen. Select "Delete" if you are sure you want to delete the user.

✖

Are you sure that you want to delete User?

Delete Cancel

1.8 Change Password

1. You can change your password by selecting "Settings" and the "My Account". You can also change your password by choosing "Change My Password" on the "Quick Links" bar.

The screenshot shows the user interface of the Ideal World and Create and Craft website. The top navigation bar includes 'HOME' and 'SETTINGS'. The 'SETTINGS' bar contains 'My Account', 'Company Information', 'Manage Users', and 'Manage Folders'. The 'My Account' page is active, displaying a 'Change Account Details' form. The form includes fields for First Name, Surname, Phone Number, Email Address, Landing Page, Documents Per Page, and Your Theme. A 'Submit' button is at the bottom of the form. On the left sidebar, the 'MAIN MENU' includes 'Inbox', 'Sent', 'Draft', 'Archived', and 'Deleted'. The 'CUSTOMISED FOLDERS' section lists 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', 'Testing', and 'June'. The 'QUICK LINKS' section includes 'Change My Password' and 'Support'.

Welcome [noaccount@idealshoppingdirect.co.uk]
Support level:

HOME SETTINGS Support Logout

My Account Company Information Manage Users Manage Folders

My Account [Change My Password](#)

* - These fields are required

Change Account Details

First Name: (*) Hauste
Surname: (*) Team
Phone Number: (*) 08701417031
Email Address: (*) noaccount@idealshoppingdirect.co.uk
Landing Page: (*) home
Documents Per Page: (*) 20
Your Theme: (*) Ideal

Submit

MAIN MENU

Inbox 4219
Sent
Draft
Archived
Deleted

CUSTOMISED FOLDERS

Hauste
Blue
New
Picklist
May (4)
Testing
June
[Edit Customised Folders](#)

QUICK LINKS

[Change My Password](#)
[Support](#)

2. You are then required to enter your old password and a new password twice for confirmation.

The screenshot shows the 'Change My Password' form. The form is titled 'Change My Password' and includes a 'Password Details' section. The 'Password Details' section contains three input fields: 'Old Password: (*)', 'New Password: (*)', and 'Confirm New Password: (*)'. A 'Save' button is at the bottom of the form. A red 'X' icon is visible in the top right corner of the page.

Change My Password

Password Details

Old Password: (*)
New Password: (*)
Confirm New Password: (*)

Save

1.9 Edit Company Information

1. To view or edit company information go to "Settings" and then choose "Company Information". If you would like to change your company email please contact Crossflow Payments Support (support@crossflowpayments.co.uk).

The screenshot displays the 'Edit Company Information' page. The top navigation bar includes 'HOME', 'SETTINGS', and 'Support level:'. The 'SETTINGS' menu is expanded, showing 'My Account', 'Company Information' (selected), 'Manage Users', and 'Manage Folders'. The left sidebar contains a 'MAIN MENU' with 'Inbox' (4221), 'Sent', 'Draft', 'Archived', and 'Deleted'. Below it is a 'CUSTOMISED FOLDERS' section with 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', 'Testing', and 'June'. At the bottom of the sidebar is a 'QUICK LINKS' section with 'Change My Password' and 'Support'. The main content area is titled 'Edit Company information' and shows the 'Company Email: noaccount@idealshoppingdirect.co.uk'. A note states: '(*) If you would like to change company E-mail please contact Hauste Support (support@hauste.com)'. A red asterisk indicates that the following fields are required. The 'Company Details' form includes fields for 'Company Name: (*)', 'Company Address 1: (*)', 'Company Address 2:', 'Town: (*)', 'County/State:', 'Postcode/Zip: (*)', 'Country: (*)', 'Currency: (*)', 'Company Registration Code:', and 'Company Vat/Tax Code: (*)'. The 'Submit' button is at the bottom right.

ideal WORLD Create AND CRAFT

Support level: ★★★★★

HOME SETTINGS Support Logout

My Account Company Information Manage Users Manage Folders

Edit Company information

Company Email: noaccount@idealshoppingdirect.co.uk

(*) If you would like to change company E-mail please contact Hauste Support (support@hauste.com).

* - These fields are required

Company Details

Company Name: (*) IDEAL SHOPPING DIRECT [na]

Company Address 1: (*) Ideal Home House

Company Address 2: Newark Road

Town: (*) Peterborough

County/State:

Postcode/Zip: (*) PE1 5WG

Country: (*) United Kingdom

Currency: (*) Vanuatu Vatu (VUV)

Company Registration Code:

Company Vat/Tax Code: (*)

Submit

2. If you have any issues or problems please do not hesitate to contact Crossflow Payments Support.

1.10 Support

1. By choosing Support this takes you to Crossflow Payments Support Centre.

The screenshot shows the user interface of the Ideal World and Create and Craft support portal. At the top, there are logos for 'ideal WORLD' and 'Create AND CRAFT'. A welcome message for user [noaccount@idealshoppingdirect.co.uk] is displayed, along with a support level indicator (four stars) and social media icons for Facebook, Twitter, LinkedIn, and YouTube. The navigation bar includes 'HOME', 'SETTINGS', 'Support' (with a speech bubble icon), and 'Logout' (with a user icon). The main content area is divided into three sections: 'MAIN MENU', 'CUSTOMISED FOLDERS', and 'QUICK LINKS'. The 'MAIN MENU' section lists 'Inbox' (4218 unread), 'Sent', 'Draft', 'Archived', and 'Deleted'. The 'CUSTOMISED FOLDERS' section shows a tree structure with folders like 'Hauste', 'Blue', 'New', 'Picklist', 'May (4)', 'Testing', and 'June Testing'. The 'QUICK LINKS' section includes 'Change My Password' and 'Support'. The 'Document Notifications' section lists recent documents with counts of new unread items and links to go to the inbox. The 'Document Totals' section provides a summary of document counts across different folders.

Folder	Total Number of Documents
Inbox - Received Documents	4393 (4218 unread)
Sent Documents	42
Draft Documents	51
Archived Documents	4
Deleted Documents	3

2. Here you can open a new ticket or check the status of an older ticket.

2. Receiving Picklists & Despatch Notes

When ISD sends you a new Picklist, the document will be delivered to the 'New' folder in your Crossflow Payments account. From there you can:

- 1) Print out the Picklist
- 2) Generate and print out the Despatch Notes.

This means you'll now have all the documentation you need to start despatching within hours (or even minutes) of the show finishing.

Importantly, when you receive a new picklist from ISD, you will also be sent an email alert to the registered email address – there's no need to keep checking your account!

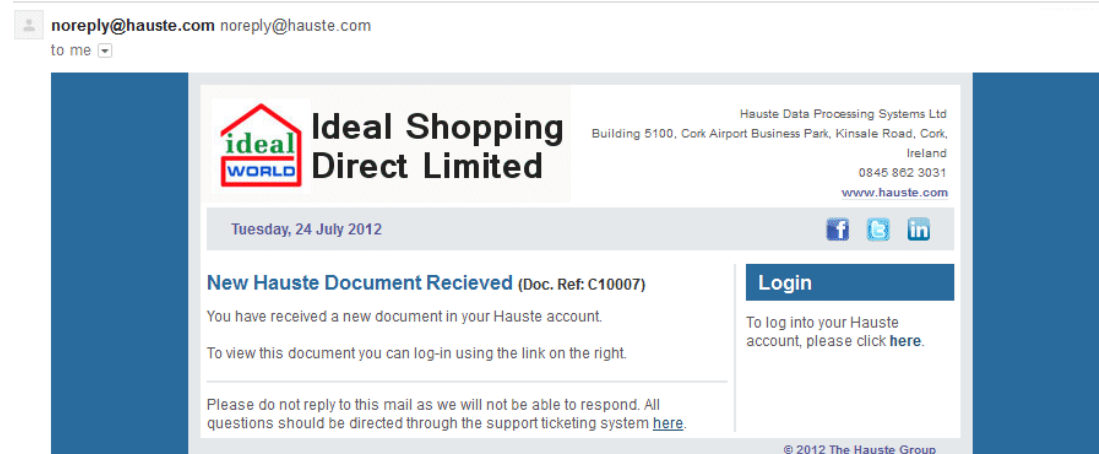
The support team do monitor your account too, so if you do miss any alerts or don't open your Picklist for any other reason (e.g. you are on holiday), we'll contact your company by way of gentle reminder to make sure somebody looks at them.

Right, let's see exactly how it works:

2.1 Accessing a Picklist & Purchase Orders via Email alert

1. When a new Picklist arrives in your Crossflow Payments account, you will be sent an email alert that looks like this:

New Hauste Document Received [ISD-PickListV2]



2. The link will bring you to the homepage where you will be able to login to your account.

Welcome [noaccount@ideashoppingdirect.co.uk]
Support level: ★★★★★

HOME
SETTINGS
Support
Logout

MAIN MENU

SEARCH

or

GO

ADVANCED SEARCH

Inbox 4218

Sent

Draft

Archived

Deleted

CUSTOMISED FOLDERS

Hauste

Elise

New

Picklist

May (4)

Testing

June Testing



Edit Customised Folders





QUICK LINKS

Change My Password

Support



Recipient/ Sender & Document Type	Document Reference	Date Sent / Received	Date Opened	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 13:00:27	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 12:03:58	30-11-0001 00:00:00	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 12:03:47	11-07-2012 13:42:06	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 12:03:54	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 12:03:31	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 12:03:27	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 10:53:31	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 10:33:58	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:55:20	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:34:13	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:34:12	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:33:58	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:33:47	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:33:44	UNREAD	
Received From: IDEAL SHOPPING DIRECT Ideal [redacted]	[redacted]	11-07-2012 09:33:43	UNREAD	


Welcome [noaccount@idealsshoppingdirect.co.uk]
Support level:    


HOME


SETTINGS


Support  Logout 


MAIN MENU

 Inbox 4218


 Sent


 Draft


 Archived


 Deleted


CUSTOMISED FOLDERS


 Hauste


 Blue

 New


 Picklist


 May (4)

 Testing

 June Testing

Quick Links

 Change My Password

 Support

































SEARCH

OR

Search for Document Reference

GO

ADVANCED SEARCH

Recipient/Sender & Document Type	Document Reference	Date Sent / Received	Date Opened	
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 13:03:27	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 12:03:58	30-11-0001 00:00:00	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 12:03:47	11-07-2012 13:42:06	 
Received From: IDEAL SHOPPING DIRECT Ideal P...			UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...			UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...			UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...			UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		10:53:31	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 10:33:38	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:53:20	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:34:13	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:34:12	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:33:58	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:33:47	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:33:44	UNREAD	 
Received From: IDEAL SHOPPING DIRECT Ideal P...		11-07-2012 09:33:27	UNREAD	 

Actions for n329229

- Open Document
- Despatch Confirmation
- Move to folder
- Archive Document
- Delete Document

CLOSE

2.3 Working with the Picklist & Despatch Notes

The Picklist layout on Crossflow Payments portal is designed to match what was sent previously by email.

1. The document is in two halves, a summary of products orders and a summary of customer orders.

IDEAL SHOPPING DIRECT PLC
Ideal Home House
Newark Road
Peterborough
PE1 5WG
UNITED KINGDOM

Tel: 44 (0) 8700 777 002
Fax: 44 (0) 8700 777 003

This is a dummy picklist
Supplier: 54321
Do not deliver!
...
...
Tel: ..

Total Orders: 2

Sales Summary: Pick List dummy_picklist-									
Product	Description	Size/Colour	Qty	Price	Total Net	Total Vat	Total Goods Value		
Purchase Order: 32-54321									
111111.000.000	A useful product	NO SIZE NO COLOUR	2	10.00	20.00	4.00	24.00		
Total For Purchase Order: 32-54321			2		20.00	4.00	24.00		
Total Orders: 2			2		20.00	4.00	24.00		

IDEAL SHOPPING DIRECT PLC
Ideal Home House
Newark Road
Peterborough
PE1 5WG
UNITED KINGDOM

Tel: 44 (0) 8700 777 002
Fax: 44 (0) 8700 777 003

This is a dummy picklist
Supplier: 54321
Do not deliver!
...
...
Tel: ..

Sales Summary: Pick List dummy_picklist-									
Customer	Order Ref	Product	Description	Size/Colour	Qty	Price	Total Net	Total Vat	Total Goods Value
1111111	DW111111111	111111.000.000	A useful product	NO SIZE NO COLOUR	1	14.99	98	3	17.99
2222222	DW222222222	111111.000.000	A useful product	NO SIZE NO COLOUR	1	14.99	98	3	17.99
Total Orders: 2		2			2		20.00	4.00	24.00



- Convert Document
- Pick List PDF
- Despatch Note
- Return to Properties
- Return to Folder

2. You can download a PDF of the pick list by clicking the 'Picklist PDF' button at the bottom of the form

3. To generate the despatch notes to go with the Picklist, you just need to click the 'Despatch Note' button

4. This will generate a PDF document that you can the print out onto normal A4 paper. This can sometimes take a few minutes to do (there's a lot of data to work through behind the scenes) so please be patient.

5. The new format despatch note has been designed to print on normal A4 paper – ISD is no longer using the version of paper that included 'peelable' sections to be stuck on the parcel. Here is an example:

6. It has been designed to be printed on normal A4 paper, which you can then fold and place in a document wallet on the outside of the parcel.

3. Confirming Despatches and Order Status

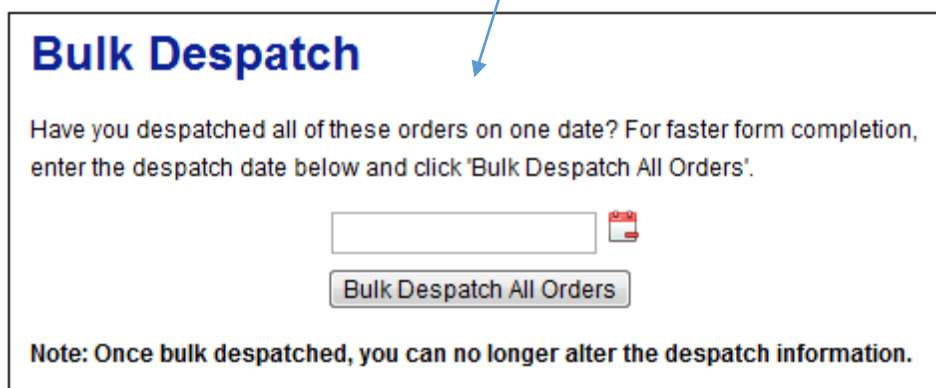
Crossflow Payments will also be replacing the 'DD tracker' system used by ISD. This means you simply need to confirm the despatch status of orders via the Crossflow Payments portal.

There are two ways to confirm Despatch:

- 1) In bulk – to be used if you despatched all orders on the same day
- 2) By order – to be used if you only delivered some orders, or had issues with stock.


3.1. Confirming Despatches in Bulk

If you have despatched all orders on the same day, there is now a very quick way to confirm this to Ideal – simply enter the despatch date in the 'Bulk Despatch' area and click the button. That's it!



Bulk Despatch

Have you despatched all of these orders on one date? For faster form completion, enter the despatch date below and click 'Bulk Despatch All Orders'.



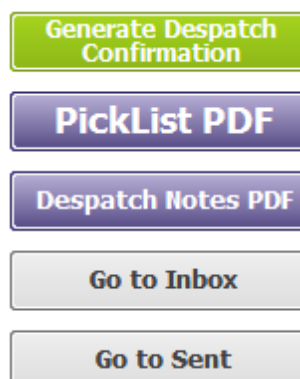
Bulk Despatch All Orders

Note: Once bulk despatched, you can no longer alter the despatch information.

3.2. Confirming part despatches, out of stocks or other issues

This is quick and simple to do, just follow these steps:

1. Open the Picklist you are working with and click on the 'Generate Despatch Confirmation' button at the bottom.



Generate Despatch Confirmation

PickList PDF

Despatch Notes PDF

Go to Inbox

Go to Sent

2. You will then see the 'Despatch Confirmation' form. You can either update the orders one at a time, or there is a 'Bulk Update' section at the top so you can confirm the details of lots of orders with one click.

IDEAL SHOPPING DIRECT
Ideal Home House
Newark Road
Peterborough
PE1 5WG
UNITED KINGDOM

Tel: +44 (0) 8700 777 002
Fax: +44 (0) 8700 777 003

Bulk Updates (first please select the records to update from table below)

Despatch Date:

Courier Name:

Reason For Delay:

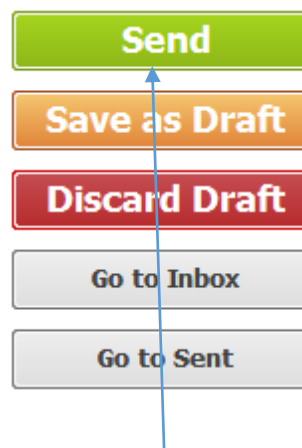
Expected Date:

Manually Entering Tracking Reference
Check the following box if you are manually entering tracking reference(s):
☐

Please NOTE: All dates must be the 25/07/2012 or after and in the format DD/MM/YYYY.

SALES Summary: Pick List

Customer	Order Ref	Product	Description	Size/Colour	Qty	Despatch Date	Courier Name	Tracking Ref	Reason For Delay	Expected Date	Comments
				NO SIZE	1		Citipost 3	ISD...			






3. Once you filled out all the details, simply click 'Send' to send the details to ISD.


IMPORTANT: If you have to send several updates, e.g. as stock becomes available, you can go through this process as many times as you need to for one Picklist. This form will remember what you submitted the last time.

4. When you click 'Send' you will be taken back to the 'Inbox'. The Picklist you were working with will now have a converted icon against it.


This means that the document has been converted.

IDEAL SHOPPING DIRECT Ideal Picklist V2		D68182na	23-07-2012 09:02:15	23-07-2012 09:27:15	 
--	---	----------	------------------------	------------------------	---

5. You can see all the Despatch Confirmations you've sent in the 'Sent Items' Folder.



Welcome [noaccount@idealshoppingdirect.co.uk]
Support level:



HOME
SETTINGS
Support
Logout

MAIN MENU

Inbox 4218
Sent
Draft
Archived
Deleted

CUSTOMISED FOLDERS

Hauste

Blue

New

Picklist

May (4)

Testing

June Testing

Edit Customised Folders

QUICK LINKS

Change My Password
Support

SEARCH
All Document Type
or
Search for Document Reference
GO
ADVANCED SEARCH

Sent Documents

Recipient & Document Type	Document Reference	Date Sent	Date Opened	
IDEAL SHOPPING DIRECT Ideal Document	Document	11-07-2012 14:05:41	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	11-07-2012 09:57:59	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	10-07-2012 15:16:54	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	10-07-2012 10:34:47	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	10-07-2012 10:01:57	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	10-07-2012 09:55:42	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	10-07-2012 09:54:43	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	10-07-2012 09:36:36	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 16:15:02	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 15:33:54	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 15:05:29	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 14:42:56	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 14:39:44	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 14:39:04	UNREAD	
IDEAL SHOPPING DIRECT Ideal Document	Document	09-07-2012 14:46:57	UNREAD	
IDEAL SHOPPING DIRECT	Document	09-07-2012		

That's it! It's as simple as that to confirm order despatch status to ISD.

4. Receiving Purchase Orders & Confirmations

When ISD sends you a new Purchase Order, the document will be delivered to the 'New' folder in your Crossflow Payments account. From there you can:

- 1) Print out the Purchase Order
- 2) Accept or Reject the Purchase Order.

4.1 Working with the Purchase Orders & Confirmations

When a user opens a Purchase Order they are presented with a screen containing the Purchase Order information and the option to accept or reject the purchase order.

Ideal Shopping Direct

SPO

Created Date: 18/01/2011

Supplier Name: European Transport Solution Ltd

PO Number: 000003

Version Number: 2 of 2

Supplier Ref: atasdf

Supplier Code: 30504

Order Status:

Currency:

Date Required: 12/02/2008

Created By: Unit Test

Reference: 0002011800

Delivery Address:

Comments:

European Transport Solution Ltd
(was NewLine Innovation Limited)
6 Metropolitan Business Park
Metropolitan Drive
FY3 9LT

[Click here to view delivery instructions](#)

[View full terms and conditions](#)

Purchase Order Confirmation

To accept or reject purchase order number 000003 complete the following input fields and click the 'Accept' or 'Reject' button.

Confirmed By:

Confirmed Date:

Comments:

Accept

Reject

Purchase Order PDF

Go to Inbox

Go to Sent

2. You can download a PDF of the Purchase Order by clicking the 'Purchase Order PDF' button at the bottom of the form.

5. Confirming Orders and Order Status

5.1. Older Versions of Purchase Orders

You will notice that Purchase Orders have a version number next to them. An example of this would be – 00003-v1.

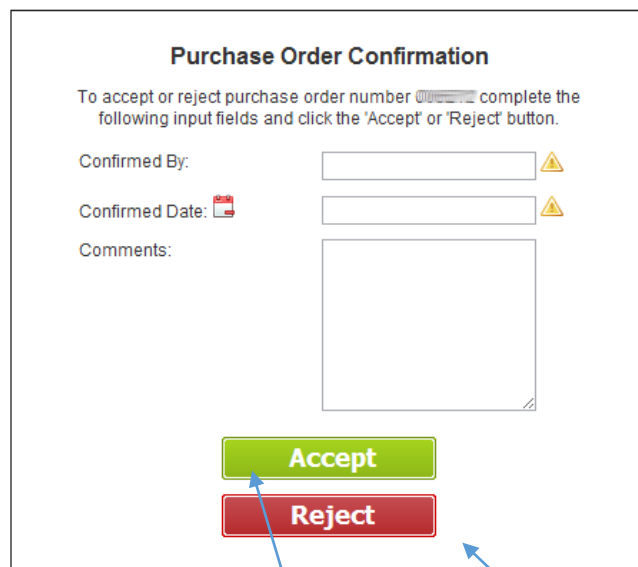
You will be notified by a banner if the Purchase Order you have opened is an older version.

Please note: This is an older version of the purchase order number 00003. The information on this screen may be incorrect. Please access the newer version in your account.

5.2. Accepting & Rejecting Purchase Orders

This is quick and simple to do, just follow these steps:

1. Open the Purchase Order you are working with and scroll to the 'Purchase Order Confirmation' box.
2. You must fill in the information for 'Confirmed By', 'Confirmed Date' and any 'Comments' regarding the Purchase Order.



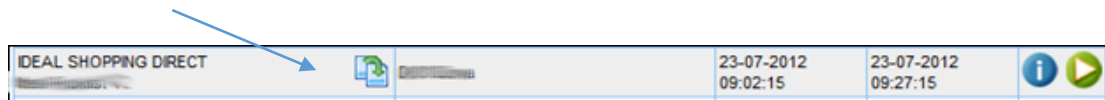
The screenshot shows a 'Purchase Order Confirmation' form. At the top, it says 'Purchase Order Confirmation' in bold. Below that, it says 'To accept or reject purchase order number 00003-v1 complete the following input fields and click the 'Accept' or 'Reject' button.' There are three input fields: 'Confirmed By:' with a text box and a warning icon, 'Confirmed Date:' with a calendar icon, a text box, and a warning icon, and 'Comments:' with a large text area. At the bottom, there are two buttons: a green 'Accept' button and a red 'Reject' button. Two blue arrows point from the bottom of the form to the 'Accept' and 'Reject' buttons.




3. You have the option to 'Accept' the document or to 'Reject' it. Simply click the option that suits you and the details will be sent to ISD.

IMPORTANT: Do not close your internet browser or press back while the order is processing as this may cause an issue.

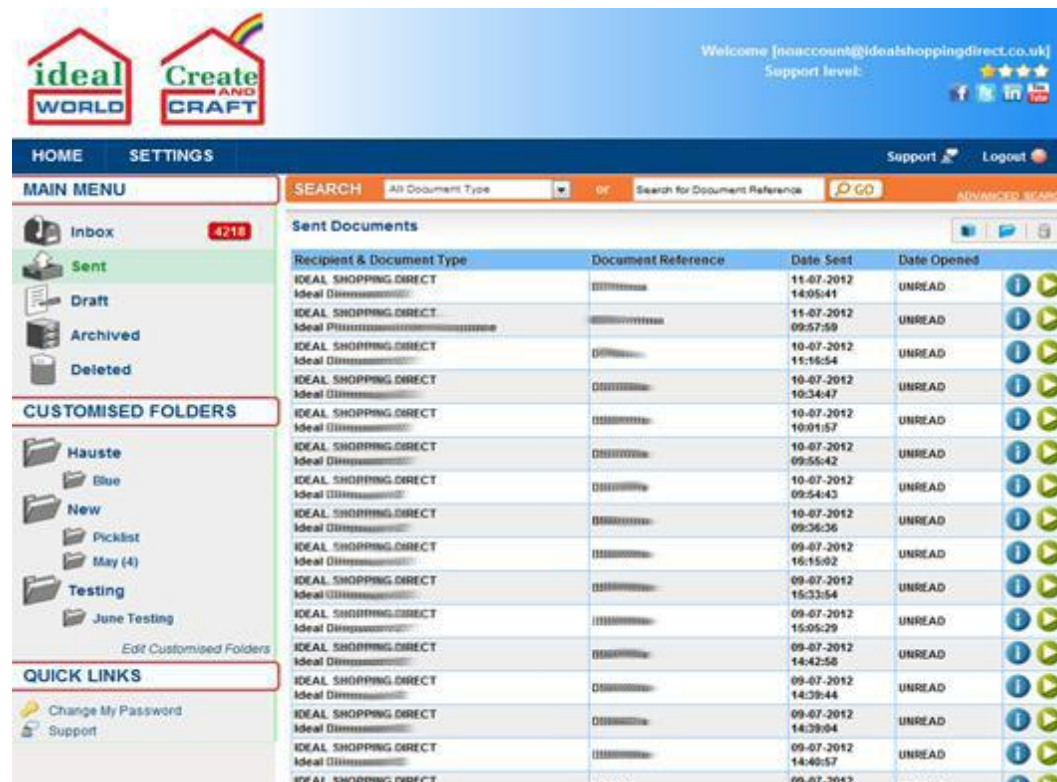
4. When you click 'Send' you will be taken back to the 'Inbox'. The Picklist you were working with will now have a converted icon against it.

This means that the document has been converted.



IDEAL SHOPPING DIRECT		23-07-2012 09:02:15	23-07-2012 09:27:15	 
-----------------------	---	------------------------	------------------------	---

5. You can see all the Purchase Order confirmations you've sent in the 'Filing Cabinet (Sent)' Folder.



ideal world Create AND CRAFT

Welcome [newaccount@idealshoppingdirect.co.uk]
Support level: ★★★★★

HOME SETTINGS Support Logout

MAIN MENU

- Inbox 4216
- Sent**
- Draft
- Archived
- Deleted

CUSTOMISED FOLDERS

- Hauste
- Blue
- New
- Picklist
- May (4)
- Testing
- June Testing

































Edit Customised Folders

QUICK LINKS

- Change My Password
- Support

SEARCH All Document Type OF Search for Document Reference GO ADVANCED SEARCH

Sent Documents

Recipient & Document Type	Document Reference	Date Sent	Date Opened	
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	11-07-2012 14:05:41	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	11-07-2012 09:57:59	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	10-07-2012 11:16:54	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	10-07-2012 10:34:47	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	10-07-2012 10:01:57	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	10-07-2012 09:55:42	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	10-07-2012 09:54:43	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	10-07-2012 09:36:36	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 16:15:02	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 15:33:54	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 15:06:29	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 14:42:56	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 14:39:44	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 14:39:04	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012 14:40:57	UNREAD	 
IDEAL SHOPPING DIRECT Ideal Dimm...	00000000	09-07-2012	UNREAD	 

That's it! It's as simple as that to confirm a Purchase Orders to ISD.